Procurement Records Checklist

The following list is a compilation of recommended documentation for sealed bid procurements (purchases over $50,000). See the Weatherization Program Manual Sections 6.2 and 6.6 for specific requirements.

- ☐ Copy of original RFB package materials (attachments, distribution cover letter, amendments and correspondence relating to amendments)
- ☐ Documentation of advertisement (Agency Letter, PO, Ad Copy)
- ☐ Vendor Solicitation List
  - ☐ Printout of researched MBE from the DOA website
- ☐ Invitation to Bid letter
- ☐ Bidder's questions documented and distributed to all Bidders
- ☐ Bidder's Meeting (if applicable) including: *sign-in sheet, meeting agenda and minutes*
- ☐ Bid Opening Minutes including: *date, sign-in showing all agency staff and contractors present, any special situations and/or reasons for a bidder's disqualification*
- ☐ Bid submittal checklist verifying all required documents are present
- ☐ Minor Omissions Policy process documented
- ☐ Bid Summary/Cost Tabulation Sheet including: *date, company, all Cost Sheet Bid Prices for comparison, MBE Price Preference & Total BID Price, disqualified bidders and the reason for disqualification*
  - ☐ Number of Bids Received: _____
  - ☐ Clearly identify the winning bidder(s) and document the basis of selection
- ☐ Original Bidder Envelopes showing received date/time stamp
- ☐ All original and complete contractor bid documents
- ☐ Excluded Parties List System (EPLS) check for debarred contractors
- ☐ Bid Appeals documentation
- ☐ Intent to Award letter in file and confirmation letter was sent to all Bidders
- ☐ Original and signed Contractual Agreement
- ☐ AA/CC documentation (See Weatherization Manual Section 6.4)
- ☐ Contractor Management documentation (correspondence, etc.)
- ☐ Contract Revisions with new and signed Contractual Agreement
- ☐ Contractor T&TA Retention Agreement (See Weatherization Manual Section 5.8.2)
- ☐ Contract Extension with new and signed Contractual Agreement
- ☐ Contractor cost increase and supporting industry wide documentation
- ☐ Vendor-initiated contract language changes sent to DES Help Desk